

CAPPS Fundamentals and Employee Self-Service

Welcome

Hello, welcome to the CAPPS HR/Payroll Fundamentals and Employee Self-Service training course.

Greetings

My name is Lisa and I am here to guide you through your training experience.

Before we get started, let's go over some pointers and tips that will help you complete this course.

Course Preparations

Here are some pointers and tips to help you complete this course.

- This course will take about 3 1/2 hours. It can be completed in sections, or all at one time.
- Go from one slide to the next using the Next and Back buttons at the bottom of the page.
- Close all other open applications (including email and IM) while taking this course.

Getting Started

Now that you are ready to begin, let's review the Course Overview, Objectives, and Outline.

Course Overview

The Fundamentals section covers basic navigation, high-level system functionality, and new terminology used in CAPPS.

The Employee Self-Service section covers employee timesheets, personal profiles, and payroll information.

This course is intended for all CAPPS HR/Payroll users and is a pre-requisite for other module classes.

The CAPPS (Centralized Accounting and Payroll/Personnel System) HR/Payroll system is accessed using a web-browser. For security purposes, users are required to use their unique log-on ID.

It is important to note:

- 1) This course does not teach any specific business process. Pages are accessed to display functionality only.
- 2) Throughout this course confidential data has been removed and replaced with fictitious information.

Course Objectives

After completing this course, you will be able to:

- Sign-in to CAPPs
- Refer to New Terms in CAPPs
- Use CAPPs navigation features
- Search for specific information
- Enter, view, and submit hours worked and leave time taken on your Timesheet
- View and edit your personal profile
- View and print your payroll information

Course Outline

This course is made up of (4) sections:

- 1) CAPPs HR/Payroll Fundamentals and ESS Timesheet (Time Reporting)
- 2) ESS eProfile (Personal HR Information)
- 3) ESS ePay (Paycheck/Warrant)
- 4) Review

Now that you are familiar with the structure of this course, let's move onto our first section.

Section 1 - Introduction

- How to sign-in to CAPPs
- How to Change Your Password

Your learning experience is presented as hands-on exercise simulations. Exercises were created using a specialized training development tool called the User Productivity Kit (UPK).

If you have never used this tool before, you can learn how by using the [Quick Reference Guide](#).

Section 1 - New Terminology

- **Company Code** - Company Code is a top-level designator. It is equivalent to Agency Number.
- **Business Unit** - Business Unit is a business level between company and departments that identifies divisions for reporting and operations. A Business Unit value may include the agency number appended with two additional characters (e.g., 30400).
- **Department** - A Department in CAPPS continues to identify an operational entity within an agency. Multiple departments can be organized by Business Unit.
- **Location Code** - Location Code defines a physical location of an agency.
- **National ID** - Your Social Security Number is known as National ID in CAPPS.
- **Employee Self Service (ESS)** - Is where you will access your personal information and Timesheet.
- **Manager Self Service (MSS)** - Where managers will approve or deny employee Timesheet, as well as, other activities.

Section 1, Lesson 1 - Exercises

Introduction

The following exercises provide step-by-step instructions on how to perform the following tasks in CAPPS:

Scenario 1: Signing In to the System

Scenario 2: Forgotten Password, Password Reset

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close that window by clicking the 'X' in the upper right-hand corner to return to this course.

Next, you will learn how to navigate once you are signed-in to CAPPS.

Let's move on to Lesson 2.

Section 1, Lesson 2

Using Navigation Features

Understanding how to move around in CAPPS is essential for every user. After completing this section, you will be able to:

- Add and delete favorites

Section 1, Lesson 2 - Exercises

Using Navigation Features

The following exercises provide step-by-step instructions on how to perform the following tasks in CAPPS:

Scenario 1: Adding and Deleting Favorites

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close that window by clicking the 'X' in the upper right-hand corner to return to this course.

Now that you understand how to navigate in CAPPS, let's learn how to use the search feature to find specific information that you may need.

Section 1, Lesson 3 - Using the Search Feature

Using the Search Feature

This section provides an overview of search pages. You will use search pages to retrieve information from CAPPS that you need. After finishing this section, you will be able to:

- Perform a Basic search
- Use an operator to perform a search
- Use a wildcard to perform a search

Section 1, Lesson 3 - Exercises

Using the Search Feature

The following exercises provide step-by-step instructions on how to perform the following tasks in CAPPS:

Scenario 1: Understanding the Basic Search feature

Scenario 2: Understanding Operators and Wildcards

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close that window by clicking the 'X' in the upper right-hand corner to return to this course.

I hope you enjoyed learning the various ways to search for information in CAPPS using search pages, operators, and wildcards.

In the next section, you will learn all about Employee Self-Service (ESS).

Character Guides

Throughout this training you will be introduced to various character guides. They will take you through your training experience.

Your character guides are:

Betty

George

Carol

Susan

Richard

Amy

Mike

Now that you have met everyone and you are familiar with the structure of this course, let's dive into Employee Self-Service.

Section 1 - ESS Timesheet

Section 1 - Objectives

- Learn how to manage your time reporting activities in the CAPPs systems:
- Learn Key Terms
- Understand the timesheet notification process
- Learn how to identify the different time reporting categories and determine your category
- Explore the various components of the Timesheet
- Learn how to enter time worked and leave time taken on the Timesheet
- Understand the various Time Reporting Codes (TRCs) used for entering time worked and leave time taken on the Timesheet
- Learn how to submit a Timesheet for approval
- Understand the various statuses of the Timesheet
- View available leave balances

Section 1 - Lesson Outline

- 1) CAPPs Time Reporting Overview - 5 min
- 2) Time Reporting Essentials - 30 min
- 3) Entering Time Worked and Leave Time Taken - 60 min
- 4) View Timesheet Status - 5 min
- 5) Viewing Time and Leave Balances - 10 min

Section 1, Lesson 1

CAPPs Time Reporting Overview

Learn Key Terminology

- Understand the time reporting process and the various roles and responsibilities around timekeeping.
- Further information specific to your agency may be available on the [Agency Partnership Training page](#). Select your agency name to view Employee Self Service support material.

Key Terms and Definitions

Timesheet - The Timesheet is used to track hours worked and leave time taken for agency employees.

Time Reporting Codes (TRC) - TRCs are used to identify the type of hours being entered on the timesheet. For example: when sick leave taken is entered on a timesheet the hours entered are

assigned the TRC for sick leave taken (SICKT). All time on the timesheet is associated to a TRC. Each different type of time has its own unique TRC. For example: Regular Hours Worked is "REGHR" and Annual Leave is "ANLVT".

Time Exceptions - Time Exceptions are warnings and errors to indicate a problem with a time reporter's time.

Reported Time - Reported time is the hours that an employee enters on their Timesheet.

Payable Time - Payable time is the result of reported time that an employee has entered on their timesheet and has been approved by their manager. It also includes regular scheduled hours that do not need to be entered on the timesheet.

Time and Labor - Time and Labor is an integrated solution in CAPPs that involves all the processes related to time worked or leave time taken for employees. It supports the time reporting needs of a wide range of business functions such as payroll, CAPPs Financials, projects, and labor allocation cost. Information entered in Time and Labor is processed through payroll.

Labor Account Code (LAC) - The LAC is used to track hours for a specific purpose. A project is an example that may have a LAC assigned. This information does not integrate with Financials/Commitment Accounting. This field is used for reporting purposes.

Override Reason Code (ORC) - ORCs are used for tracking purposes to identify periods of time that are worked for a specific reason such as recording time worked during a disaster.

Positive Time Reporter - Positive Time Reporters are hourly paid employees. An assigned schedule does not appear on their timesheet. Positive Time Reporters need to enter all hours physically worked or leave taken on their timesheet in order to get paid.

Exception Time Reporter - Exception Time Reporters are Exception Hourly (salaried) employees. Their timesheet reflects an assigned schedule with the applicable daily hours. Exception Time Reporters enter time on the timesheet only when it deviates from their assigned scheduled hours, or when an ORC or LAC is applicable. This includes hours worked over their regular scheduled hours and any leave time taken during their scheduled hours.

FMLA ID - This field is used to track FMLA hours. The FMLA ID number is assigned by your Human Resource Representative and manually entered.

Key Roles & Responsibilities

Employee - This role is responsible for making sure that all the hours reflected on their timesheet are accurate. This includes physical hours worked and leave time taken for Positive Time Reporters and Exception Time Reporters.

Manager - This role is responsible for monitoring, reviewing, and approving time worked or leave time taken entered on the employee timesheet. Managers can also enter time on behalf of an employee.

Time Administrator - This role performs the duties of the manager on behalf of the manager.

Agency Super User - This role provides oversight to the other roles and can monitor, review, approve and enter time on behalf of an employee. This role also has the authority to correct exceptions that occur from Time Admin processing, and can run reports and queries at an agency level.

Timesheet Workflow

Timesheet Workflow: Employees enter their time, when applicable.

Section 1, Lesson 2

Time Report Essentials

- Learn the different reporting categories and identify your category.
- Learn how Time Reporting Codes are used to identify time worked and leave time taken.
- Learn how to use Labor Account Codes if applicable for your agency.
- Further information specific to your agency may be available on the [Agency Partnership Training page](#). Select your agency name to view Employee Self Service support material.

Time Reporting Categories

Key Concept: Time **MUST** be entered on the Timesheet according to the correct Time Reporting Category.

How do you know your Time Reporting Category?

Betty and George enter their time worked differently on the CAPPS Timesheet. They work in different Time Reporting Categories.

Betty: My time reporting category is a **Positive Time Reporter**.

This is known as an hourly employee. In CAPPs, I am compensated according to the hours that I actually work.

Therefore, I enter all the time I work as Regular Time on my Timesheet. I will use the Time Reporting Code 'REGHR' for Regular Hours Worked. If I forget to enter my time, I will not receive a warrant.

George: My time reporting category is an **Exception Time Reporter**.

This is known as a salaried employee. In CAPPs, I am paid according to a predefined work schedule that has been assigned to me in the system.

Therefore, I only enter hours on my Timesheet that I have physically worked over my regular scheduled hours or leave taken.

To find out what happens if George forgets to enter his overtime hours worked or leave time taken:

- If I forget my time, I will be paid according to my regular scheduled hours. However, I will not bank FLSA overtime or compensatory time for the hours I physically worked over my schedule and my leave balances may not be accurate.

In this scenario: George will still need to enter his hours worked over his schedule and his leave taken to ensure his time and leave records are correct.

What if you still can't tell what type of Time Reporter you are?

It's actually very easy.

If you **have an assigned schedule** on your timesheet, you are an **Exception Time Reporter**.

If you **do not**, you are a **Positive Time Reporter**.

Exception Time Reporters - Enter only hours that deviate from their assigned work schedule, such as: additional time worked or leave time taken.

Time Reporting Codes (TRCs)

Time Reporting Codes are used on the Timesheet to identify what type of time is being entered. The TRC used here is 'ANLVT', which means: Annual Leave Time Taken.

A list of statewide TRCs is displayed on the right. The most commonly used TRCs are underlined.

Additional TRCs may be available at your agency. Refer to [Agency specific information](#) for further details.

Labor Account Codes (LACs)

Labor Account Codes (LACs) are used to track hours for a specific purpose. A project is an example that may have an LAC assigned.

Physical time worked can be associated with an LAC on the employee timesheet. It is not necessary to work the entire day on one specific LAC. Time can be allocated across LACs and across days.

LACs are Agency-specific. Employees should consult with their manager before entering a specific LAC.

Section 1, Lesson 3

Entering Time Worked and Leave Time Taken

- Understand the components of the timesheet.
- Learn how to enter regular hours worked for positive time reporters (exception hourly).
- Learn how to enter leave time taken, such as: comp time, sick time taken, and annual leave.
- Learn how to enter flex time and time for multiple leaves taken.
- Learn how to enter holiday time, such as: worked, not worked, holiday comp time, etc.
- Learn how to complete the Employee Time Certification.
- Further information specific to your agency may be available on the Agency Partnership Training page. Select your agency name to view Employee Self Service support material.

Timesheet Components

Did you know that CAPPS uses decimals, not minutes for time reporting? For example:

- 15 minutes = .25 hours;
- 30 minutes = .50 hours;
- 45 minutes = .75 hours

For example: If you work 7 1/2 hours, you would enter 7.50 hours and not 7.30 on your Timesheet.

Components on the Timesheet are the same for Betty, the Positive Time Reporter and George, the Exception Time Reporter.

Complete the exercise below:

Understanding Timesheet Components

Scenario 1: Timesheet Components

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Reporting Time Worked

Remember, Betty is a Positive Time Reporter.

Betty needs to enter all the hours she physically works or leave taken on her Timesheet in order to receive compensation on her paycheck.

The following exercise provides step-by-step instructions on how to perform the following task in CAPPS:

Positive Time Reporter

Scenario 2: Enter Regular Hours Worked-Positive Time Reporter

Scenario 3: Enter Time Over 40 Hours-Positive Time Reporter

Scenario 4: Enter Leave Time Taken-Positive Time Reporter

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Entering Exception Time

Remember, George is an Exception Time Reporter.

George is compensated according to his assigned work schedule. Therefore, he only enters physical hours worked or leave time taken on the Timesheet when it deviates from his work schedule.

Sometimes I am required to work beyond my scheduled hours. How do I enter my additional time?

The following exercises provide step-by-step instructions on how to perform the following tasks for Exception Time Reporting in CAPPS:

How to enter additional hours worked (Hours worked greater than your work schedule)

Scenario 5: Enter Overtime/Comp Time Worked

Scenario 6: Enter Time for Flex Schedule

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Entering Exception Time

Remember, George is an Exception Time Reporter.

George is compensated according to his assigned work schedule. Therefore, he only enters physical hours worked or leave time taken on the Timesheet when it deviates from his work schedule.

Sometimes I need to take time off from work. How do I enter my leave time on my Timesheet?

The following exercises provide step-by-step instructions on how to perform the following tasks for Exception Time Reporting in CAPPS:

How to enter leave time taken (Scheduled hours not worked)

Scenario 7: Enter Annual Leave Taken

Scenario 8: Enter Sick Time Taken

Scenario 9: Enter Regular Comp Time Taken

Scenario 10: Enter FLSA Overtime Taken

Scenario 11: Enter Leave Without Pay

Scenario 12: Enter Multiple Leave Types

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Entering Exception Time

Exception Time Reporters and Positive Time Reporters enter Holiday time the same way.

How do I enter my time if there is a holiday?

The following exercises provide step-by-step instructions on how to perform the following tasks for Exception Time Reporting in CAPPs:

How to enter Holiday Time

Scenario 13: Enter Time Worked on a Scheduled Holiday

Scenario 14: Enter Optional Holiday Time Taken and Work a Holiday

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Labor Account Codes (LACs)

Sometimes I work on projects with an LAC. How do I enter my hours worked to an LAC?

To learn how to enter a Labor Account Code (LAC) on the Timesheet, complete the exercise below:

Using Labor Account Codes

Scenario 15: Allocating hours worked to an LAC

Scenario 16: Allocating hours worked to multiple LACs

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Further information specific to your agency may be available on the [Agency Training Partnership page](#). Select your agency name to view Employee Self Service support material.

Employee Time Certification

An Agency may require its employees and contingent workers to complete an Employee Time Certification. This is generally done once a month for the prior month. To learn how to perform this process click the button below and complete the exercise scenario 17.

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Section 1, Lesson 4

Timesheet Status

Hours entered on the timesheet go through several stages as they get ready to be processed by payroll. After an employee enters hours on a timesheet, and selects E-sign & Submit, the timesheet moves through the following stages:

- **Needs Approval** – The hours are waiting for the manager to approve or deny.
- **Approved or Denied** – After the manager has approved or denied the hours.
- **Submitted** – Once the manager approves the hours, the reported hours are processed by Time Administration and sent to payroll.

Once a timesheet has been submitted, the hours are grayed out on the timesheet and cannot be changed by the employee. If your manager denied your hours because you need to make a change, you will need to re-enter the correct hours on a new line.

Note: Whenever a change is made to an employee’s timesheet, the employee will receive an email notification.

Section 1, Lesson 5

Viewing Time and Leave Balances

- Learn how to view time and leave balances

Exercises:

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPS:

Learn how to view Time and Leave Balances

Scenario 1: View Leave Balances/Expirations

Scenario 2: Employee Monthly Time Report

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Congratulations, you have finished all the Time Reporting lessons!

Section 2 - eProfile

Section 2 - Objectives

Learn how to view and update your Human Resources information in the CAPPS systems:

- View or update your personal information
- View or update phone number and mailing address
- Request a name change
- Update your information release indicator
- Maintain disability status

Section 2, Lesson 1 Introduction

CAPPS Employee Self Service now offers employees the opportunity to play a role in managing their own Human Resources information, such as: updating their personal information, or adding an emergency contact.

Carol works in Human Resources and Susan is an agency employee who has recently moved.

The Human Resources office is going to need Susan's new address.

Susan goes to see Carol in the HR office.

She says, "Good morning Carol (Human Resources), I moved last week, so I am bringing you my new Address."

Carol says, "Thank you. By the way, did you know that you can update your address using Employee Self Service in CAPPS?"

Susan says, "No, I didn't."

Carol responds and says, "Well it is very easy. There are also other things you can do, like view your phone number, or update your emergency contact information. You should check it out."

Susan didn't know CAPPS Employee Self Service had so many features.

Section 2, Lesson 1 Exercises

eProfile Human Resources Personal Information

Exercises

Learn how to view or update Human Resources information

Scenario 1: View my personal information

Scenario 2: Edit Emergency Contacts

Scenario 3: Edit Phone Number

Scenario 4: Edit Mailing Addresses

Scenario 5: Request Name Change

Scenario 6: Information Release Indicator

Scenario 7: Maintain Disability Status

Scenario 8: BRP Leveling / Non-Leveling

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises close the window by clicking on the "X" in the upper right-hand corner to return to the course.

Section 3 - ePay

Section 3 - Objectives

Learn how to view and/or update your payroll information in CAPPS:

- View and/or print your earnings statement (paycheck) and compensation history
- View or update direct deposit
- View, add, or update voluntary or charitable deductions

- View, update, or print tax information

Section 3 - Lesson Outline

- View and Print Earnings Statement - 5 min
- Add or Change Direct Deposit Information - 5 min
- View, Add, or Update Voluntary or Charitable Deductions - 10 min
- View Tax Information - 10 min

Further information specific to your agency may be available on the [Agency Partnership Training page](#). Select your agency name to view Employee Self Service support material.

Section 3, Lesson 1

View and Print Earnings Statement

Hum, I need a copy of my Paycheck. Can I get it in CAPPS?

Yes, I remember now, Carol in HR told me it's available in Employee Self Service.

Let us learn how together by completing the exercises.

Exercises:

Learn how to view your earnings information

Scenario 1: View/print your earnings statement (paycheck)

Scenario 2: View compensation history

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the "X" in the upper right-hand corner to return to the course.

Section 3, Lesson 2

Add or Change Direct Deposit Information

I need to make a change to my direct deposit but I don't want it to affect my paycheck.
What should I do?

Amy, the timeframe around when you make a change to your Direct Deposit can directly affect the outcome of your deposit. You should check with your Human Resources Representative or

Payroll Administrator before making the change to avoid any unwanted interruptions.

Wow, I am glad that I checked with Carol in Human Resources before making a change to my direct deposit.

To learn how to change direct deposit Information, complete the exercise.

Exercise

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPS:

Learn how to manage your direct deposit information

Scenario 1: View/Edit Direct Deposit

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercise, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Section 3, Lesson 3

Understanding Deductions

Mike asks, what is the difference between a Voluntary Deduction and a Charitable Deduction?

Voluntary Deductions are just that, voluntary. As an employee you can opt to deduct a flat amount from a paycheck to be direct deposited at a Credit Union.

Voluntary Deductions can begin or end whenever you like and can be automatically stopped by setting a total maximum amount to be deducted.

And, there is no limit to the number of voluntary deductions.

Charitable Deductions can only be established during open enrollment. You elect a charitable institution from a predetermined list in the program.

After open enrollment has closed, you cannot add/change your charitable elections until the next election period. However, you can edit the dollar amount you elected to give.

As an employee you can have up to three (3) deductions.

Section 3, Lesson 3

View, Add, or Update Voluntary or Charitable Deductions

Exercises:

To learn how to add a voluntary or charitable deduction, complete the exercises listed below:

Scenario 1: Voluntary Deductions

Scenario 2: 2015 Charitable Deductions

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Section 3, Lesson 4

View Tax Information

Hello Carol, I would like to get a copy of my W-2.

Hi Amy, sure I would be glad to help you with that, but did you know that you could print a copy from your desk?

That’s great! How can I do that?

Exercises:

The following exercise provides step-by-step instructions on how to perform the following tasks in CAPPS:

Scenario 1: W-4 Tax Information

Scenario 2: View/Print W-2 and W-2c Information

Scenario 3: W-2 and W-2c Consent

[View exercise scenario \(opens a new web browser\).](#)

After completing the exercises, close the window by clicking on the “X” in the upper right-hand corner to return to the course.

Section 4 - Review

Summary

Congratulations, you have completed this course. Today you learned the following CAPPS Fundamentals and Employee Self Service features:

- How to sign in to CAPPS
- How to navigate through CAPPS pages
- How to search for specific information
- How to enter, view, and submit hours worked and leave time taken on your Timesheet
- How to view and edit your personal profile
- How to view and print your payroll information

Conclusion

This completes the course.